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**Facilitator Guide – Budget**

**What is in this Guide?**

This guide provides facilitators with the information they need to conduct a workshop around the essential components of state and/or district digital learning plans. It is our assumption that the facilitator will have at least a basic knowledge about learning in the digital age. Ideally, the facilitator should understand the basic components of a digital learning plan.

This guide provides facilitators with step by step activities, with suggested times for each activity, as well as narrative content and resources to support the topic. This guide is accompanied by a presentation slide deck for use during the workshop. It also includes a link to the logistics spreadsheet to help facilitators plan the workshop. Logistics include recommendations for audio visual, catering, registration and outreach.

This facilitator guide can be used in its current format or it is easily customizable to meet your needs. The guide is organized as follows:

* Purpose of the workshop
* Objectives for participants
* Key sections with suggested times
* Resources

**Purpose of the Workshop**

The goal of this session is for participants to learn more budgeting options for digital learning.

**Objectives**

● Learn more about budgeting for digital learning

● Collaborate with colleagues on key questions related to digital learning budgets

● Acquire resources to support budget planning and considerations

● Develop and maintain relationships with other district and state leaders

**Session Overview (Total time: 60 minutes)**

* Welcome and Introductions (5-10 minutes)
* Background (5-10 minutes)
* Budgeting Options (5-10 minutes)
* Budgeting Options Activity (20-25 minutes)
* Reflection and Wrap Up (5-10 minutes)

\*\*Please note – the timing of activities requires a rapid paced session. Each facilitator will need to consider their audience (as related both to background knowledge and size) as well as future opportunities for professional learning opportunities around the topic and then choose the activities and time commitment for each.

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**Welcome and Introductions (5-10 minutes)**

***Facilitator Note:*** *Introduce yourself, review the agenda and logistics for the session. Introduce the welcome activity. This activity will help the facilitator better understand the audience. If you have a large group, ask the participants to complete this via individual tables vs whole group. You can also choose an activity from the Activity Toolbox.*

**Take off Touch Down**

Learners stand and sit to answer questions as the facilitator polls the group. This is a great way to get participants up and moving. The facilitator makes a statement. Participants to whom the statement applies stand up ("Take Off"). Facilitator makes the next statement. For those standing, if the statement applies, remaining standing; otherwise sit down ("Touch Down"). For those seated, if the statement applies, stand up; otherwise remain seated.

Sample statements:

* Stand if your primary role is budgeting.
* Stand if your primary role is purchasing.
* Stand if you are an administrator.
* Stand if you leverage digital tools in your personal/social life.
* Stand if you leverage digital tools in your classroom/school/district.

**Background (10 minutes)**

***Facilitator Note:*** *This section includes a brief overview of budgeting in the digital age. Key topic areas include transformative budgeting, total cost of ownership and value of investment.*

**Overview**

To promote effective and efficient uses of digital tools and resources, spending should align with the district vision for digital learning. Strategic short- and long-term budgeting is essential as states, districts, and schools continue to make investments in bandwidth, networking, devices, and digital instructional materials to support effective digital learning. The [National Education Technology Plan (NETP 2017)](https://tech.ed.gov/netp/) recommends that once a district establishes a vision for the use of technology, district and school leaders should examine existing budgets to identify areas in which spending can be reduced or eliminated to pay for learning technologies. As districts are often challenged financially when it comes to implementing technology initiatives and programs, they should also consider creative funding for the implementation of digital learning. Cost savings can take place when technology based tools and resources are not viewed as additional costs but as an opportunity to shift funding to support learning in the digital age.

**Transformative Budgeting**

The following three essential strategies characterize transformative budgeting when applied to technology readiness for digital learning:

* Alignment of technology expenditures with the goals in the district’s strategic plans.
* A cross-functional budget leadership team that brings together finance, technology, curriculum and instruction.
* Zero-based budgeting – a process through which education leaders begin each budget cycle at zero in each category, and then add costs to the budget only when there is evidence that such costs are required to meet goals.

**Total Cost of Ownership**

Total cost of ownership includes ALL of the costs for the acquisition of digital tools and resources. For example, additional cost to consider for acquiring instructional materials:

* cost of digital instructional materials
* print costs of downloaded materials
* licensing fees for programs or apps;
* purchase of devices;
* increasing internet bandwidth;
* implementing wireless spots;
* a new or updated content delivery platform;
* technology maintenance and updates;
* curation of the materials;
* professional development and training.

**Value of Investment**

The value of investment evaluates the anticipated costs and benefits of a project. CoSN developed a methodology for districts to estimate the total costs and expected strategic benefits of proposed technology initiatives. CoSN’s [VOI tool](http://www.cosn.org/voi) includes a project cost estimator and project benefits tool. The VOI process can help districts evaluate proposed projects, compare projects and present costs and benefits to stakeholders.

***Facilitator Note:*** *Choose the featured video or select one of your own. This activity will help support the mindset of the participants; provide an opportunity for dialogue; and share experiences in and among leaders. Choose whole group, table or partner discussion depending on timing and size of group.*

**Garnering Sustainable Funding**

St Vrain Valley School District Superintendent Don Haddad describes how sustainable funding is critical to digital transformation. He describes both the process and allocation of funds.

<https://www.youtube.com/watch?v=VpmWY8kBBa4&t=75s>

**Discussion Questions:**

* Share one thing that is similar about your school/district and the featured location.
* How has your district engaged the community to support new funding?

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**Budgeting Options (10 minutes)**

***Facilitator Note:*** *Use the notes below to prepare for the budgeting options activity.*

**Eliminate or Reduce Existing Costs**

As technology enables new learning opportunities and experiences, it also can render existing processes and tools obsolete, freeing up funds to pay for technology. Three obvious examples are copy machines (and related supplies and services contracts), dedicated computer labs, and replacing commercially licensed textbooks with openly licensed educational resources. As part of #GoOpen, OET challenged schools to begin this process by replacing just one textbook with openly licensed educational resources in the next 12 months as a first step in appreciating the cost savings and developing an understanding of what would be necessary to implement such a change school- or district-wide.

**Partner with Other Organizations**

Partnership options for securing resources include local businesses and other organizations, alumni, internal and nearby teacher experts to provide professional development, and curriculum development arrangements with other districts. Some school districts have formed partnerships with local and county governments, sharing technology infrastructure and technical staff to keep costs down.

**Take Advantage of Economies of Scale**

States/districts/schools can take advantage of economies of scale with consolidated purchasing for internet, devices and digital tools and resources across agencies and departments. Forming partnerships with state and local agencies when building and purchasing broadband access together takes advantage of the economies of scale. These economies of scale also can be realized through consortium purchasing such as the Kentucky Valley Educational Cooperative, which represents several districts and higher education institutions at once and helps decide issues of resource allocation.

**Make Full Use of Federal Funds**

The [E-rate program](http://www.usac.org/sl/) provides substantial price discounts for infrastructure costs for schools and public libraries and is one source of technology funding. In addition, for funding beyond connectivity, a U.S. Department of Education Dear Colleague letter, published in November 2014 and updated in January 2017, provides guidance and examples for leveraging existing federal funds for technology-related expenditures.

**Ensure Sustainability of Grant Funding**

Grant funding for digital initiatives may come from academic or non-profit organizations. It is important to budget for the sustainability of a new program or initiative. One approach is to build in a budget over time that includes dedicated funding in the budget that matches the original grant amount to sustain a program.

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**Budgeting Options Activity** **(20-25 minutes)**

***Facilitator Note:*** *Use this activity to encourage group discussion around potential solutions for effective budgeting. The facilitator introduces the* [***TodaysMeet***](https://todaysmeet.com/) *activity or chooses another activity from the Activity Toolbox. Depending on time constraints, the facilitators can choose only the small group activity or both the small group and whole group activities.*

**Small Group (15-20 minutes)**

The facilitator sets up 3-5 TodaysMeet rooms depending on the number of key questions to discuss. Each room will address one of the key questions for the topic. The facilitator assigns each table a room. Participants at each table will discuss the question in their room. After 5 minutes, participants go to the next room and add to the discussion.

**Whole Group (10-15 minutes)**

After the individual room discussions are completed, the facilitator brings the group together and the facilitator summarizes information from each room. The facilitator asks participants to consider the following:

* What are the tips or best practices you learned from your colleagues?
* Did you identify any potential pitfalls?
* Did you discuss any resources that would be beneficial to your work in this area?

**Sample Discussion Questions**

* What stakeholders need to be at the table to develop a budget that leverages digital learning tools/resources?
* How are you maximizing economies of scale?
* How are you maximizing federal dollars?
* If your school/district does not do zero based budgeting – how would shifting to that model change your budget process?
* If you already do zero based budgeting – what are the biggest challenges?
* Have you addressed total cost of ownership?
* How do you determine value of investment?
* Why are some budgets difficult to spend?

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**Reflection and Wrap Up (5-10 minutes)**

***Facilitator Note:*** *Take a few moments to reflect on the session, share details about additional events related to the remainder of the day and engage the audience to take action when they return to their schools/districts. Use this activity or choose another one from the Activity Toolbox.*

**Circle, Square, Triangle Activity**

By table, ask participants to discuss where they are in the process using the reflective concept of circle, square, triangle.

Circle – You are still circling these ideas in your mind

Square – You understand the challenge

Triangle – You are ready to implement change

Based on the reflection activity, identify the next steps for your state, district or school.

**Wrap-Up**

***Facilitator Note:*** *The facilitator wraps up the day and shares resources with participants. Sample language: “This is only the first step of many steps in supporting teachers and students for learning in the digital age. I encourage you to follow up on our reflection activity during the next few weeks and continue to collaborate with your peers. Think about what tools and resources you can use to maintain relationships and encourage collaboration, as well as identify opportunities for on-going professional learning and workshops.*

**Facilitator Guide Resources**

[Building Technology Infrastructure for Learning](https://tech.ed.gov/futureready/infrastructure/)

C[oSN Smart IT (includes TCO and Value of Investment)](http://www.cosn.org/focus-areas/it-management/smart-it)

[Digital Instructional Materials Acquisition Policies for States (DMAPS)](http://dmaps.setda.org/)

[Every Student Succeeds Act (ESSA)](https://www.ed.gov/essa)

[Future Ready Self Assessment – Budget](http://dashboard.futurereadyschools.org/uploads/media/default/0001/01/f587a1a8a1215a7b8ed5440da8817bc6a4f247c4.pdf)

[K-12 Total Cost of Ownership Case Studies](http://www.cosn.org/tco)

[National Education Technology Plan (NETP)](https://tech.ed.gov/files/2017/01/NETP17.pdf)

[Navigating the Digital Shift](http://dmaps.setda.org/)

[SETDA and Common Sense Kids Action, E-rate Modernization Resources](http://www.setda.org/priorities/equity-of-access/e-rate-modernization/)

[SETDA’s Examining the Budget Implications of Digital Content](http://digitallearning.setda.org/content-software/#!/budget)

[Stories of Ed Tech Innovation](https://tech.ed.gov/stories/)

**Exemplars**

**New Jersey**: The New Jersey Department of Education’s 2015 paper, Transformative Budgeting for Digital Learning, includes the following considerations to shift budgets in support of digital learning.

* Alignment of technology expenditures with the goals in the district’s strategic plans. Ideally, budget development activities occur after the annual academic planning process. A budget is developed that translates strategic plans into actions and specifies the financial resources necessary to implement the plan.
* A cross-functional budget leadership team that brings together finance, technology, curriculum, and instruction. Using teamwork from the start to collaboratively investigate options for cost savings, efficiencies, and options for alternative funding streams. By working together and not in silos, the team ensures priorities for budgeting are transparent and have the support of key stakeholders.
* Transformative zero-based budgeting—a process through which education leaders begin each budget cycle at zero in each category, and then add costs to the budget only when there is evidence that such costs are required to meet goals. That process includes identifying the metrics and methodology to ensure accountability for learning returns on investment. CoSN offers a Value of Investment Tool [VOI] for objectively analyzing the anticipated costs and benefits of a proposed project, which includes a return on investment worksheet and project benefits worksheet.